

25 Questions

A Client/Law Firm Checklist

The Client and The Firm

1. What is the strategic direction for this client's business in the next one to five years?
2. Would acting for this client be strategic to our business in that work could involve more than one practice area, or have potential to do so within one to five years?
3. What practice areas would be involved immediately? What areas could be involved in the future?
4. Does this client appear financially sound and/or in a financially stable business/industry?

The Client's Perspective

5. What traits does this client say they value: e.g. specific expertise, industry knowledge, responsiveness, creativity, communications, firm size, office location, fee consideration, other?
6. How does the client prefer to work with outside counsel: e.g. what has worked for them, what hasn't?
7. What is the client's perspective on our firm, or what has been their experience with our firm?
8. What does the client require or need most in order to retain our firm: e.g. specific expertise, industry knowledge, depth of resources, fee considerations, fast turnaround, inclusion in the process, other?

The Client's Legal Needs

9. What are this client's current and future legal needs?
10. What other work might this client have that could be developed in the next year/two years/five years that could involve other practice areas?
11. What is this client's level of legal knowledge: novice, some exposure, highly experienced?
12. What specific expertise do we have that matches:
1) the client's industry, and 2) their legal needs?

The Client's People

13. Who are the key decision makers: e.g. GC, CEO, COO, CLO, Board of Directors, other?
14. Who or what influences this client's business decisions: e.g. Board of Directors, markets, other?
15. Who do we know at this client, and what is their role? Conversely, who do they know at our firm?

The Client's Market

16. What market and/or industries is the client in – now, and in the future?
17. Is this client in an emerging or mature business/industry? If mature, what is the growth potential within or beyond their current market or industry?
18. What challenges and uncertainties does the client face: e.g. in their market, industry, internally, etc.?
19. Who are this client's main competitors: does this create conflict for our firm?

The Client's Future Needs and Relationships

20. What is the likelihood this client will develop new products, services, or offerings in the next year/two years/five years for which they may need legal advice?
21. What kinds of legal issues does this client anticipate facing within the next two years?
22. Which of our practice areas will most likely be needed to provide future legal assistance?

Nurturing The Relationship

23. Which members of our firm will have immediate key relationship ties with this client?
24. To nurture our future relationship, who should be introduced to this client now?
25. What types of firm communications and ancillary services will help nurture our relationship with this client: e.g. in-house seminars, secondments, client surveys, newsletters, etc.?